



Indiana Housing Finance Authority Request for Proposal For Document Imaging Services

Dated: April 18, 2005

I. Overview

The Indiana Housing Finance Authority (IHFA) seeks to contract with a qualified document imaging company(s) with extensive experience in successfully executing a variety of substantial document imaging projects. IHFA anticipates entering into an annual contract (with the potential for renewal in 2006) for such services, which are detailed in the Scope of Services section of this RFP.

The documents to be transferred to digital image, have received or have applied to receive funding through one of IHFA's HOME Investment Partnerships Program (HOME), Low Income Housing Trust Fund (Trust Fund), Community Development Block Grant (CDBG), any one of several low interest rate mortgage and first time home buyer incentive (First HOME) programs and/or Section 42 Rental Housing Tax Credit (RHTC) programs.

IHFA will require imaging on three primary file categories listed below. IHFA estimates the need for document imaging services during calendar year 2005 as follows:

Community Development – Approximately 1,037,500 documents in IHFA's Community Development department. This department has documents in 7-8 different file formats.

RHTC Applications – Approximately 410,000 documents, in two primary file formats, in IHFA's Multi-Family department

Single Family – Approximately 250,000 documents to be scanned in IHFA's Single Family department. These files will be most comparable to mortgage files at a more traditional lending facility. Single Family's documents are in 5 varied file configurations.

II. IHFA's Objectives

In selecting an imaging company pursuant to this RFP, IHFA seeks to meet the following objectives:

1. Reliability— No lost data can be permitted. All records are of the utmost importance.
2. Productivity— Increase staff access to information now kept in various storage facilities.
3. Consolidation – Free up storage space via the eventual elimination of hard copies of imaged documents.

III. Imagine Company Scope of Services

The selected imaging company will be charged with providing the following document scanning services with respect to all applicable IHFA departments

- A. The secure transport of documents to be imaged to and from the scanning facility(s) and IHFA storage facilities.
- B. Required preparation of filed documents as needed to facilitate the scanning process.
- C. Scanning & Imaging of actual documents while maintaining integrity of the varied file formats.

IV. RFP Process

A. Proposal Due Date

Proposals must be submitted by 5:00 pm (EST) on Friday, May 2, 2005 to the address listed below to be eligible for consideration. Respondents must provide an original and five (5) full copies of the proposal and supporting material. IHFA will time and date stamp proposals to evidence timely receipt.

B. Receipt of Proposals

Those submitting a proposal shall submit an original and five copies of the proposal to:

Indiana Housing Finance Authority
ATTN: RHTC Allocation Manager
30 South Meridian Street, Suite 1000
Indianapolis, IN 46204

All proposals received will become the property of IHFA and will not be returned. IHFA reserves the right to reject any or all proposals at its sole discretion.

Any question(s) relating to this Request for Proposals should be addressed to Melanie Reusze, at the foregoing address or by telephone at 317-232-7777.

C. Selection Process

IHFA staff and Board members, as well as IHFA's counsel will evaluate all proposals submitted to the Authority by the stated deadline. Based on the evaluation criteria, a short list of the highest ranked proposals may be notified, and separate negotiations will then be conducted with each selected firm to discuss its respective proposal. At the conclusion of these negotiations, IHFA will establish a deadline for final offers from each of the selected firms. Final selection will be at the sole discretion of the Indiana Housing Finance Authority.

D. Proposal Evaluation Criteria

The following will be IHFA's primary considerations in the selection of a document scanning and imaging firm(s):

1. Quality and experience of firm
2. Operational systems and procedures
3. Responsiveness/timelines
4. Minority/Women Owned-Business Enterprise
5. Competitive fees

V. RFP Submission Items

Directions: Please address each item applicable to your experience under each category heading. Attach sheets as necessary, with the name of your company shown on each page. The signature section at the end of this form must be completed and signed, and must accompany your written attachments.

1. Quality and Experience of Firm

- a. References and current portfolio
- b. Experience of principals and staff
- c. Resume(s)

2. Operational Systems and Procedures

- a. Systems in place to complete imaging in a timely manner
- b. Systems in place to deliver documents imaged (as required), and digital images to and from IHFA
- c. Overall ability to address the Scope of Services detailed in Section III of this RFP

3. Responsiveness/timelines

- a. Estimates on the amount of time for project completion by department and for the entire Authority. This may include more than one potential option for completion schedules. Please include all cost differentials that apply to each disparate completion schedule.

4. Minority/Women Business-Owned Enterprises

- a. Minority/Women Business-Owned Enterprises (MBE/WBE) are encouraged to submit a proposal. If you are an MBE/WBE and will be applying as such, documentation that verifies certification must be submitted at the time of proposal.

5. Competitive Fees

- a. Please provide your bid for services as described in the Scope of Services section of this RFP.

\$_____ Per page

\$_____ Set-up cost

\$_____ Transportation of documents

\$_____ All other fees, please specify _____

\$_____ Total Proposed Fee

Terms and Conditions:

This request is issued subject to the following terms and conditions:

1. This request is for the submission of proposals, but is not itself an offer and shall under no circumstances be construed as an offer.
2. The Authority expressly reserves the right to modify or withdraw this Request at any time, whether before or after any proposals have been submitted or received.
3. The Authority may reject any or all submissions submitted in response to this Request at any time prior to entering into a written agreement.
4. In the event the party selected does not enter into the required agreement to carry out the purposes described in this request, the Authority may, in addition to any other rights and remedies available at law or in equity, commence negotiations with another person or entity.
5. In no event shall any obligation of any kind be enforceable against the Authority unless and until a written agreement is entered into.
6. Each respondent agrees to bear all costs and expenses of its response and there shall be no reimbursement for any costs and expenses relating to the preparation of responses of proposals submitted hereunder or for any costs or expenses incurred during negotiations.
7. By submitting a response to this Request, each respondent waives all rights to protest or seek any remedies whatsoever regarding any aspect of this request, the selection of a respondent or respondents with whom to negotiate, the rejection of any or all offers to negotiate, or a decision to terminate negotiations.

Signature Section

Name of Company: _____

Address: _____

Phone: _____ Fax: _____

Name of person preparing this response: _____

Title: _____

Signature: _____ Date: _____